MSFT-KC TELEMENTAL HEALTH PROTOCOL

General policies

- No new participating parties are allowed to begin or join sessions. That is, clients that are not already on the original file with signatures on all initial Intake paperwork cannot participate.
- Children ages 12 and under will ONLY be seen when the consenting adult or legal guardian is present throughout the entirety of the session.
- Adolescents ages 13 to 17 may be seen individually ONLY when the parent is present to consent at the beginning of the session and present at the end of the session for rescheduling.
- The following numbers should be provided/confirmed with the client
  - Placement site voicemail number for a client to reach you
  - Emergency numbers local to client

Please read this carefully as it outlines the steps you will need to take related to conduct video sessions with clients.

In preparation for conducting telemental health video sessions, you must make sure of the following:

PREPARING TO USE ZOOM:

☐ Download Zoom on your selected device. If you do not have a device that is compatible with Zoom, please contact Dr. Sarah Lyon. Download Zoom FIRST before asking your client to do so.
https://zoom.us/download

☐ **TEST** starting a Zoom meeting with a peer, family member or friend. It is highly recommended you test starting a Zoom meeting through email links and through sending a message to someone on their phone. Zoom has several videos to help you through this process:
https://zoom.us/resources

MAKING THE CALL (this is only needed if the student therapist did not have the opportunity to review this in-person):

☐ Call your client via telephone and tell them the following information:

☐ Notify client of placement site status regarding COVID-19 procedures.

☐ During the pandemic, we are offering to continue therapy via video sessions. Ask your client if they are interested in continuing their therapy in this format.

- **IF YES**, schedule a day and time for the session and document on the *Tele-mental Health File Contact Log*.
  - Also, tell them that they will need to find a private place for them to do the session, free from the presence or interruption of anyone else.
  - During this time, inform them of any session fee structure outlined by your community placement site during the COVID-19 crisis.
  - You will need to set up an agreed upon passcode to verify you and the client if you are using audio-only telehealth

- **IF NO**, tell them that you can refer them to 2-1-1 to obtain current information on other low cost counseling centers that remain open at this time. Explain that due to the rolling nature of the virus, you don't want to give them specific referrals that may be closed as well. 2-1-1 should have a current list of open clinics. Another possible place to find current mental health resources is the main line at Johnson County Call Center at (913) 715-5000 for clients in

Johnson county or Truman Medical Center Behavioral Health (816) 404-5700 for Jackson County residents.

Ask the client if they will be using a phone or a tablet/computer. If they are using a phone, they can receive a message from you with a link. If they are using a computer, they will receive an email from you with a link. Students need to use their Friends email to send this link.

FIRST TELEMENTAL HEALTH SESSION WITH AN ADULT INDIVIDUAL CLIENT

☐ Go to your therapy setting approved by your faculty.

☐ Record the session per usual. Be sure to have your camera behind you to ensure visibility of the client system.

☐ Video call your client on the day and time you have mutually arranged.

☐ The first thing you do after identifying yourself to your client is to remind your client of the need for the conversation to remain confidential and ask if they feel like their location will provide them confidentiality. You will do this at the beginning of ***EVERY SINGLE VIDEO SESSION***.

If the client is using the Audio function only (without video), the first thing you do after identifying yourself to your client is to ask your client to give you their full name(s) (write this down on the *TELEMENTAL HEALTH PROGRESS NOTE*). Then ask for the mutually agreed upon password. You will do this at the beginning of ***EVERY SINGLE TELEPHONE SESSION if video is not turned on***. Be sure to clarify they are the only person present for the session.

☐ Next, ask your client to give you the location, address, and contact number of where they are at that moment in time (write the full address down on the *TELEMENTAL HEALTH PROGRESS NOTE*). You will do this at the beginning of ***EVERY SINGLE VIDEO SESSION***.

☐ Prior to beginning the first video session, you must review the *TELEMENTAL HEALTH INFORMED CONSENT* and obtain verbal consent. This is only needed if you did not have the chance to have them sign it in-person.

☐ If the client consents, print the date, time, and name of client that has consented at the bottom of the *Telemental Health Informed Consent*. Then sign your name on the form.

☐ You will then begin the 50-minute session (the 50 minutes includes the time you used to review the TELEMENTAL HEALTH INFORMED CONSENT).

☐ At the conclusion of the session, confirm the day and time of the next video session. Also tell the client that you will be checking your voice mail regularly for messages. Verify that they have your voice mail phone number. Remind them voice mail is not for emergency services.

☐ Complete the *TELEMENTAL HEALTH PROGRESS NOTE*.

ALL SUBSEQUENT TELEMENTAL HEALTH SESSIONS WITH AN ADULT INDIVIDUAL CLIENT

☐ Go to your therapy setting approved by your faculty.

☐ Record the session per usual. Be sure to have your camera behind you to ensure visibility of the client system.

☐ Video call your client on the day and time you have mutually arranged.

☐ The first thing you do after identifying yourself to your client is to remind your client of the need for the conversation to remain confidential and ask if they feel like their location will provide them confidentiality. You will do this at the beginning of ***EVERY SINGLE VIDEO SESSION***.

If the client is using the Audio function only (without video), the first thing you do after identifying yourself to your client is to ask your client to give you their full name(s) (write this down on the *TELEMENTAL HEALTH PROGRESS NOTE*). Then ask for the mutually agreed upon password. You will do this at the beginning of ***EVERY SINGLE TELEPHONE SESSION if video is not turned on***. Be sure to clarify they are the only person present for the session.

☐ Next, ask your client to give you the location, address, and contact number of where they are at that moment in time (write the full address down on the *TELEMENTAL HEALTH PROGRESS NOTE*). You will do this at the beginning of ***EVERY SINGLE VIDEO SESSION***.

☐ You will then begin the 50-minute session.

☐ At the conclusion of the session, confirm the day and time of the next video session. Also tell the client that you will be checking your voice mail regularly for messages. Verify that they have your voice mail phone number. Remind them voice mail is not for emergency services.

☐ Complete the *TELEMENTAL HEALTH PROGRESS NOTE*.

FIRST TELEMENTAL HEALTH SESSION WITH A COUPLE

☐ In the case of co-therapy, the student therapists will first confer about the appointment time and the primary student therapist will initiate the video call with the clients (e.g., one partner of a couple, parent/guardian of a minor). Remember the primary student therapist is the student whose supervisors provides direction on the case. The co-therapist was added to the file at a later date.

☐ Go to your therapy setting approved by your faculty.

☐ The primary therapist will initiate the video call. The co-therapist and clients will join the appointment. The couple must be in the same physical location with one another.

☐ Record the session per usual. Be sure to have your camera behind you to ensure visibility of the client system.

☐ Video call your client on the day and time you have mutually arranged.

☐ The first thing you do after identifying yourself to your client (both of them) is to remind them of the need for the conversation to remain confidential and ask if they feel like their location will provide them confidentiality. You will do this at the beginning of ***EVERY SINGLE VIDEO SESSION***.

If the client system is using the Audio function only (without video), the first thing you do after identifying yourself to your client is to ask your client to give you their full name(s) (write this down on the *TELEMENTAL HEALTH PROGRESS NOTE*). Then ask for the mutually agreed upon password. You will do this at the beginning of ***EVERY SINGLE TELEPHONE SESSION if video is not turned on***. Be sure to clarify they are the only system present for the session.

☐ Next, ask your clients to give you the location, address, and contact number of where they are at that moment in time (write the full address down on the *TELEMENTAL HEALTH PROGRESS NOTE*). You will do this at the beginning of ***EVERY SINGLE TELEMENTAL HEALTH SESSION***.

☐ Prior to beginning the first video session, you must review the TELEMENTAL HEALTH INFORMED CONSENT and obtain their verbal consent. This is only needed if you did not have the chance to have them sign it in-person.

☐ If the clients consent, print the date, time, and name of clients that have consented at the bottom of the Telemental Health Informed Consent. Then sign your name on the form.

☐ You will then begin the 50-minute session (the 50 minutes includes the time you used to review the TELEMENTAL HEALTH INFORMED CONSENT

☐ At the conclusion of the session, confirm the day and time of the next video session. Also tell the clients that you will be checking your voice mail regularly for messages. Verify that they have your voice mail phone number. Remind them voice mail is not for emergency services.

☐ One of you will complete the *TELEMENTAL HEALTH PROGRESS NOTE*.

ALL SUBSEQUENT TELEMENTAL HEALTH SESSIONS WITH A COUPLE

☐ Go to your therapy setting approved by your faculty.

☐ Record the session per usual. Be sure to have your camera behind you to ensure visibility of the client system.

☐ Video call your client on the day and time you have mutually arranged.

☐ The first thing you do after identifying yourself to your client (both of them) is to remind them of the need for the conversation to remain confidential and ask if they feel like their location will provide them confidentiality. You will do this at the beginning of ***EVERY SINGLE VIDEO SESSION***.

If the client system is using the Audio function only (without video), the first thing you do after identifying yourself to your client is to ask your client to give you their full name(s) (write this down on the *TELEMENTAL HEALTH PROGRESS NOTE*). Then ask for the mutually agreed upon password. You will do this at the beginning of ***EVERY SINGLE TELEPHONE SESSION if video is not turned on***. Be sure to clarify they are the only system present for the session.

☐ Next, ask your clients to give you the location, address, and contact number of where they are at that moment in time (write the full information down on the TELEMENTAL HEALTH PROGRESS NOTE). You will do this at the beginning of ***EVERY SINGLE TELEMENTAL HEALTH SESSION***.

☐ You will then begin the 50-minute session.

☐ At the conclusion of the session, confirm the day and time of the next telephone session. Also tell the client that you will be checking your voice mail regularly for messages. Verify that they have your voice mail phone number. Remind them voice mail is not for emergency services.

☐ One of you will complete the *TELEMENTAL HEALTH PROGRESS NOTE.*

FIRST TELEMENTAL HEALTH SESSION WITH AN ADOLESCENT (Ages 13 – 17)

☐ Go to your therapy setting approved by your faculty.

☐ Record the session per usual. Be sure to have your camera behind you to ensure visibility of the client system.

☐ Video call your client's parent/guardian on the day and time you have mutually arranged. The first thing you do after identifying yourself to parent/guardian and client is to remind them of the need for the conversation to remain confidential and ask if they feel like their location will provide them confidentiality (write this down on the TELEMENTAL HEALTH PROGRESS NOTE). You will do this at the beginning of ***EVERY SINGLE TELEMENTAL HEALTH SESSION***.

☐ Next, ask your client system to give you the address of where the parent and teen are at that moment in time (write the full address down on the TELEMENTAL HEALTH PROGRESS NOTE). You will do this at the beginning of ***EVERY SINGLE TELEMENTAL HEALTH SESSION***.

If the client system is using the Audio function only (without video), the first thing you do after identifying yourself to your client is to ask your client to give you their full name(s) (write this down on the *TELEMENTAL HEALTH PROGRESS NOTE*). Then ask for the mutually agreed upon password. You will do this at the beginning of ***EVERY SINGLE TELEMENTAL HEALTH SESSION if video is not turned on***. Be sure to clarify they are the only system present for the session.

☐ Prior to beginning the first video session, you must review the TELEMENTAL HEALTH INFORMED CONSENT and obtain verbal consent from one of the parents or legal guardian and the teen client. You will then verbally review the TELEMENTAL HEALTH INFORMED CONSENT. You only need to do this if this wasn't signed in-person.

☐ If the teen client and parent or legal guardian consents, document the date, time, and name of teen client and parent/guardian that has consented. Then sign your name on the form. The parent/guardian MUST consent.

☐ You will then begin the 50-minute session (the 50 minutes includes the time you used to review the TELEMENTAL HEALTH INFORMED CONSENT).

☐ At the conclusion of the session, confirm the day and time of the next video session. Also tell the client that you will be checking your voice mail regularly for messages. Verify that they have your voice mail phone number. Remind them voice mail is not for emergency services.

☐ An adult must be present and consent at the beginning of every session even if the adult then opts to leave the "session" in order to conduct an individual adolescent session.

☐ Complete the *TELEMENTAL HEALTH PROGRESS NOTE*.

ALL SUBSEQUENT VIDEO SESSIONS WITH AN ADOLESCENT (Ages 13-17)

☐ Go to your therapy setting approved by your faculty.

☐ Record the session per usual. Be sure to have your camera behind you to ensure visibility of the client system.

☐ Video call your client's parent/guardian on the day and time you have mutually arranged. The first thing you do after identifying yourself to parent/guardian and client is to remind them of the need for the conversation to remain confidential and ask if they feel like their location will provide them confidentiality (write this down on the TELEMENTAL HEALTH PROGRESS NOTE). You will do this at the beginning of ***EVERY SINGLE TELEMENTAL HEALTH SESSION***.

☐ Next, ask your client system to give you the address of where the parent and teen are at that moment in time (write the full address down on the TELEMENTAL HEALTH PROGRESS NOTE). You will do this at the beginning of ***EVERY SINGLE TELEMENTAL HEALTH SESSION***.

If the client system is using the Audio function only (without video), the first thing you do after identifying yourself to your client is to ask your client to give you their full name(s) (write this down on the *TELEMENTAL HEALTH PROGRESS NOTE*). Then ask for the mutually agreed upon password. You will do this at the beginning of ***EVERY SINGLE TELEMENTAL HEALTH SESSION if video is not turned on***. Be sure to clarify they are the only system present for the session.

☐ You will then begin the 50-minute session

☐ At the conclusion of the session, confirm the day and time of the next video session. Also tell the client that you will be checking your voice mail regularly for messages. Verify that they have your voice mail phone number. Remind them voice mail is not for emergency services.

☐ Complete the *TELEMENTAL HEALTH PROGRESS NOTE*.

☐ Parent/guardian must be present and consent at the beginning of every session even if the adult then opts to leave the "session" in order to conduct an individual adolescent session. Parent/guardian must be present at the end of the session for scheduling and confirm conclusion of the session.

TELEMENTAL HEALTH SESSION WITH A CHILD(REN) AGES 12 AND UNDER

☐ Telemental health sessions with a child(ren) ages 12 and under **will NOT occur** unless the adult or legal guardian is present **at every session** and **for the entirety of the session**.

☐ Go to your therapy setting approved by your faculty.

☐ Record the session per usual. Be sure to have your camera behind you to ensure visibility of the client system.

☐ Video call your client's parent/guardian on the day and time you have mutually arranged. The first thing you do after identifying yourself to parent/guardian and client is to remind them of the need for the conversation to remain confidential and ask if they feel like their location will provide them confidentiality (write this down on the TELEMENTAL HEALTH PROGRESS NOTE). You will do this at the beginning of ***EVERY SINGLE TELEMENTAL HEALTH SESSION***.

☐ Next, ask your client system to give you the address of where the parent and child are at that moment in time (write the full address down on the TELEMENTAL HEALTH PROGRESS NOTE). You will do this at the beginning of ***EVERY SINGLE TELEMENTAL HEALTH SESSION***.

If the client system is using the Audio function only (without video), the first thing you do after identifying yourself to your client is to ask your client to give you their full name(s) (write this down on the *TELEMENTAL HEALTH PROGRESS NOTE*). Then ask for the mutually agreed upon password. You will do this at the beginning of ***EVERY SINGLE TELEMENTAL HEALTH SESSION if video is not turned on***. Be sure to clarify they are the only system present for the session.

☐ Prior to beginning the first video session, you must review the TELEMENTAL HEALTH INFORMED CONSENT and obtain verbal consent from one of the parents or legal guardian and the child client. You will then verbally review the TELEMENTAL HEALTH INFORMED CONSENT. You only need to do this if this wasn't signed in-person.

☐ If the child client and parent or legal guardian consents, document the date, time, and name of client and parent/guardian that has consented. Then sign your name on the form. The parent/guardian MUST consent.

☐ You will then begin the 50-minute session (the 50 minutes includes the time you used to review the TELEMENTAL HEALTH INFORMED CONSENT). An adult must be present and consent and remain throughout the entirety of the session.

☐ At the conclusion of the session, confirm the day and time of the next video session. Also tell the client system that you will be checking your voice mail regularly for messages. Verify that they have your voice mail phone number. Remind them voice mail is not for emergency services.

☐ Complete the TELEMENTAL HEALTH PROGRESS NOTE.

ALL SUBSEQUENT VIDEO SESSIONS WITH A CHILD(REN) AGES 12 and UNDER

☐ Telemental health sessions with a child(ren) ages 12 and under **will NOT occur** unless the adult or legal guardian is present **at every session** and **for the entirety of the session**.

☐ Go to your therapy setting approved by your faculty.

☐ Record the session per usual. Be sure to have your camera behind you to ensure visibility of the client system.

☐ Video call your client's parent/guardian on the day and time you have mutually arranged. The first thing you do after identifying yourself to parent/guardian and client is to remind them of the need for the conversation to remain confidential and ask if they feel like their location will provide them confidentiality (write this down on the TELEMENTAL HEALTH PROGRESS NOTE). You will do this at the beginning of ***EVERY SINGLE TELEMENTAL HEALTH SESSION***.

☐ Next, ask your client system to give you the address of where the parent and child are at that moment in time (write the full address down on the TELEMENTAL HEALTH PROGRESS NOTE). You will do this at the beginning of ***EVERY SINGLE TELEMENTAL HEALTH SESSION***.

If the client system is using the Audio function only (without video), the first thing you do after identifying yourself to your client is to ask your client to give you their full name(s) (write this down on the *TELEMENTAL HEALTH PROGRESS NOTE*). Then ask for the mutually agreed upon password. You will do this at the beginning of ***EVERY SINGLE TELEMENTAL HEALTH SESSION if video is not turned on***. Be sure to clarify they are the only system present for the session.

☐ You will then begin the 50-minute session. An adult must be present and consent and remain throughout the entirety of the session.

☐ At the conclusion of the session, confirm the day and time of the next video session. Also tell the client system that you will be checking your voice mail regularly for messages. Verify that they have your voice mail phone number. Remind them voice mail is not for emergency services.

☐ Complete the TELEMENTAL HEALTH PROGRESS NOTE.